

DEPARTMENT OF WORKFORCE  
DEVELOPMENT  
Secretary Roberta Gassman  
201 East Washington Avenue  
P.O. Box 7946  
Madison, WI 53707-7946  
Telephone: (608) 266-7552  
FAX: (608) 266-1784  
www.dwd.state.wi.us



State of Wisconsin  
Governor Jim Doyle

DEPARTMENT OF HEALTH AND  
FAMILY SERVICES  
Secretary Kevin R. Hayden  
1 West Wilson Street  
P.O. Box 7850  
Madison, WI 53707-7850  
Telephone: (608) 266-9622  
FAX: (608) 266-7882  
www.dhfs.wisconsin.gov

TO: **Income Maintenance Supervisors**  
**Income Maintenance Lead Workers**  
**Income Maintenance Staff**  
**W-2 Agencies**  
**Workforce Development Boards**  
**Job Center Leads and Managers**  
**Training Staff**  
**Child Care Coordinators**

FROM: Amy Mendel-Clemens  
Technical Assistance, Training & Education  
Section  
Bureau of Eligibility Management  
Division of Health Care Financing

BEM/DWS OPERATIONS MEMO			
No:	07-24		
DATE:	05/09/2006 <b>REVISED 05/29/07</b>		
FS	<input type="checkbox"/>	MA	<input checked="" type="checkbox"/>
CTS	<input type="checkbox"/>	CC	<input type="checkbox"/>
FSET	<input type="checkbox"/>	EA	<input type="checkbox"/>
JAL	<input type="checkbox"/>	JC	<input type="checkbox"/>
WIA	<input type="checkbox"/>	Other	<input type="checkbox"/>
SC	<input type="checkbox"/>	W-2	<input type="checkbox"/>
CF	<input type="checkbox"/>	RAP	<input type="checkbox"/>
EP	<input type="checkbox"/>	★	<input type="checkbox"/>
<b>PRIORITY: HIGH</b>			

**SUBJECT:** ACCESS Apply for Benefits and CWW Changes June 2007

**CROSS REFERENCE:** ACCESS Handbook  
Process Help Chapters 2.3, 3.12 and 66

**EFFECTIVE DATE:** **June 25, 2007**

### **PURPOSE**

The purpose of this memo is to describe enhancements to ACCESS Apply for Benefits (AFB) and the corresponding changes to CWW.

### **BACKGROUND**

In keeping with the Department's ongoing efforts to ease agency workload, streamline application processing, and respond to workers' suggestions, the following enhancements will be made to the ACCESS Apply for Benefits online tool.

- Language has been added to ACCESS to let the applicant know when no one in the household meets the basic Medicaid (MA) program requirements.
- To reduce worker follow-up on applications that are signed by someone other than the applicant, ACCESS will now ask whether an applicant has a Legal Guardian (LG),

Power of Attorney (POA), or Authorized Representative (AR). Applicants may now use ACCESS to formally designate an AR.

- To reduce the amount of time workers spend looking at the PDF version of the online application to verify that the appropriate person signed the application, a special attention flag will display on the CWW ACCESS Application Summary page. The flag will note if there is a LG, POA, or AR and whether the online signature matches that of the applicant, LG, POA, or AR.
- To help agencies identify applicants who may be eligible for Emergency MA (EMA) or Tuberculosis MA (TBMA), ACCESS will now ask basic questions to assess an applicant's potential eligibility for these programs. If an applicant is potentially eligible, a special attention flag will display on the CWW ACCESS Application Summary Page.
- To reduce the amount of worker follow-up needed on MA applications, ACCESS will now collect detailed information about the following:
  - Health insurance policies for applicants who indicate they have health insurance.
  - Assets, disability and living arrangement for applicants who indicate they are elderly, blind or disabled (EBD).
- To help agencies manage and assign applications from applicants who may be eligible for EBD MA and/or are living in an institution, the CWW Inbox search will now include search criteria for EBD and institutionalized applicants.
- Special attention flags will appear on the CWW ACCESS Application Summary page so that workers are aware of certain data about an applicant that has been recorded through ACCESS.
- To assist workers in accessing a copy of the ACCESS application, it will now be stored in the Electronic Case File (ECF).

## **ACCESS AND CWW ENHANCEMENTS**

### *NO ONE MEETS NON-FINANCIAL CRITERIA FOR MA*

If no applicant in the household appears to meet the non-financial criteria for MA, ACCESS will display a message letting the applicant know that no one in the household meets the basic rules. At that point, applicants have the option of stopping or continuing with the application. This may reduce the number of applications from individuals who are non-financially ineligible.

### *LEGAL GUARDIAN, POWER OF ATTORNEY, AUTHORIZED REPRESENTATIVE*

#### **ACCESS Change**

ACCESS will ask if the applicant has a Legal Guardian, Power of Attorney, or Authorized Representative (AR). When one exists, contact information regarding this individual will be collected from the applicant. The signature page has also been updated to collect the signature of the LG, POA, or AR.

In addition, during the application process, applicants will have the opportunity to designate an Authorized Representative and complete an online version of the Authorization of Representative form (HCF 10126).

**CWW Change**

CWW will display a special attention flag on the ACCESS Application Summary page to indicate that there is a LG, POA, or AR designation present.

If the applicant completed an online version of the AR form, an image of the completed form will be available within the AFB PDF as well as in the Case Information subfolder in the ECF (refer to the ECF Handbook Chapters [1.5](#) and [1.6](#) for more information). Follow up with the applicant will be necessary if no form is attached to the application.

Until CARES Mainframe screen ACDP is moved to CWW, workers will need to go to the PDF to see if the online AR form was completed and to get the information needed to complete screen ACDP.

SIGNATURE MATCHING**ACCESS Change**

ACCESS will check to see if the electronic signatures entered on the application match the entered names of the applicant and/or LG, POA, or AR

**CWW Change**

CWW will display a special attention flag on the ACCESS Application Summary page to indicate that the signature matches or does not match the name on the application. If the signature does not match, the worker should view the PDF to determine how the application was signed. If the application does not have a valid signature (refer to [MEH 2.1.3.5](#) Signing the Application), the agency should contact the applicant or the applicant's representative to collect the appropriate signature. Follow existing verification policy and procedures.

OTHER MEDICAID PROGRAMS**ACCESS Change**

ACCESS will now include questions about whether the applicant has been diagnosed with Tuberculosis (TBMA), or whether members of a household with non-citizens have had an emergency medical (EMA) condition.

**CWW Change**

A special attention flag will appear on the ACCESS Application Summary page when an applicant answers yes to either of these questions. Because TBMA and EMA are manually processed, the agency will need to follow up with the applicant in order to complete the application process. Refer to Process Help for more information on how to process a TBMA or EMA application.

OTHER HEALTH INSURANCE**ACCESS Change**

Detailed information will be collected about any health insurance policies covering anyone in the home, including insurance company name and address, policy number, policy holder and coverage dates.

**CWW Change**

The information entered by the applicant will be available on the CWW Medical Coverage page for worker review. Follow existing verification policy and procedures.

EBD MA APPLICANTS**ACCESS Changes**

If an applicant indicates that s/he is elderly or blind or disabled, ACCESS will now ask detailed questions pertaining to assets, disability, and living arrangement. Corresponding changes have been made to CWW. As a result, local agencies will receive and review more complete information from online applications for EBD applicants.

ACCESS applications are an alternative to the paper application currently used in the EBD MA and long-term care application process. Nursing home residents, for example, will be able to apply for Institutional MA using ACCESS. Community Waivers and Managed Long-Term Care Programs (e.g., Family Care and Partnership) applicants may also use ACCESS to complete a MA application. However, please note, this change does not affect other existing processes in place for these applicants, including functional screening and determining medical remedial expenses.

DISABILITY**ACCESS Change**

DDB disability status will be collected for applicants who indicate that they are disabled or blind. ACCESS will also provide a link to the paper Medicaid Disability Assessment (MADA) form.

**CWW Change**

The disability information entered by the applicant will be available on the CWW Disability page for worker review. Follow existing verification policy and procedures.

IRWE**ACCESS Change**

For an individual who indicates he/she is EBD, ACCESS will ask if s/he has Impairment Related Work Expenses (IRWE).

**CWW Change**

When the answer to the IRWE question is yes, the CWW Employment gatepost question regarding IRWE's will be switched to yes and worker follow-up will be necessary. Follow existing verification policy and procedures.

EDUCATIONAL AID**ACCESS Change**

For an individual who indicates s/he is elderly or blind or disabled, ACCESS will ask if he/she receives any grants, loans or scholarships for education or training.

**CWW Change**

When the answer to the ACCESS questions about receipt of any type of educational aid is yes, the CWW Unearned Income gatepost question regarding grants, loans or scholarships will be switched to yes and worker follow-up will be necessary. Follow existing verification policy and procedures.

INSTITUTIONS**ACCESS Change**

Information about the nursing home or care facility will be collected if the applicant indicates he/she resides in an institution.

**CWW Change**

The information entered by the applicant will be available on the CWW Institution page for worker review. Follow existing verification policy and procedures.

COMMUNITY SPOUSE**ACCESS Change**

If the person who resides in the institution has a community spouse, ACCESS will gather information about the spouse and his or her signature.

**CWW Change**

The community spouse information entered by the applicant will be available in CWW for worker review. A special attention flag will display on the ACCESS Application Summary page if the applicant has a community spouse, along with a flag to show whether or not the spouse signed the application. Follow existing verification policy and procedures.

ASSETS**ACCESS Change**

If someone enters information that indicates s/he is elderly or blind or disabled, detailed information about liquid assets, vehicles, life insurance, personal property, burial assets, and real estate will be collected. Joint owner information will also be gathered when the applicant indicates an asset is jointly owned.

**CWW Change**

Any information entered about liquid assets, vehicles, life insurance, personal property, burial assets, and real estate will be available on the corresponding CWW asset pages for worker review. Follow existing verification policy and procedures.

DIVESTMENT**ACCESS Change**

ACCESS will ask if any assets have been transferred for less than fair market value.

**CWW Change**

When the answer to the divestment question is yes, the CWW gatepost question regarding divestment will be switched to yes and worker follow-up will be necessary. Follow existing verification procedure as outlined per policy.

**CWW CHANGES RELATED TO PROCESSING EBD APPLICATIONS**

The following changes have been made to CWW to help local agencies manage and process ACCESS applications:

INBOX SEARCH

Changes have been made to the CWW Inbox to allow agencies to search for various types of applications including EBD applications.

The “EBD Members (60+ Blind or Disabled)” search criteria has been changed from a dropdown box of Yes and No to four separate selection options. The four new search criteria options have been added to assist agencies in further defining the search to select only specific types of cases to assign to an appropriate office and worker, and to assist those workers pulling cases directly from the Inbox.

The new search criteria will allow workers to search for ACCESS applications based on whether or not there are EBD or institutionalized individuals on the application. Because agencies may need to assign FS EBD cases to a non FSET office or worker, the EBD members are identified using the FS EBD definition of **over age 60, disabled or blind.**

**Inbox Search Criteria – RFAs / ACCESS Applications**

**Advanced Search**

**Inbox Search Criteria** Restore to Default Search Criteria Save Search Criteria

\* County / Tribe: 40 - MILWAUKEE COUNTY

\* Assignment Status: Unassigned

Office:

Worker ID:

Programs Requested: Any Program

Medicaid  FoodShare  Family Planning Waiver  
 Caretaker Supplement  Child Care  W-2

Language: - Any Language

First Letter of Applicant's Last Name: A to Z

Priority Service Eligible: All

Filing Date: Any Day

Between  /  /  and  /  /

**EBD Members (60+, Blind or Disabled) / Institutions:**  Only EBD  Mixed (EBD + Non EBD)  Institution  No EBD or Institutions

Item Type:  RFAs  MI - Page One  MI - Entering Data  MI - Data Entry Complete  
 ACCESS Applications  ACCESS Page One  ACCESS RFAs

FoodShare Hardship: All

ZIP:

The four new criteria are:

- **All EBD Members:** When this box is checked, the search results will include applications where all individuals listed on the application meet the EBD criteria. This will not include applications where the primary person is residing in an institution. If this box is un-checked, the search results will not include these applications.
- **Mixed EBD and non EBD Members:** When this box is checked, the search results will include applications that contain both EBD and non EBD members. This will not include

applications where the primary person is residing in an institution. If this box is un-checked, the search results will not include these applications.

- **Institutions:** When this box is checked, the search results will include applications with a primary person who resides in an institution. If the box is un-checked, the search results will not include these applications.
- **No EBD or Institution:** When this box is checked, the search results will include applications with only non EBD members, and where the primary person is not in an institution. If the box is un-checked, the search results will not include these applications.

**REMEMBER** ➤ Cases that display based on the search criteria will include both FS and MA cases.

All four of the EBD/Institution search criteria boxes will be checked by default. When all four search criteria are selected the search results will include applications with all EBD members, both EBD and non EBD members, a primary person residing in an institution and applications for households with no EBD members. A worker must remove the check mark from the box if s/he does not want to include that search criteria in the search results. More than one box can be checked but at least one box must be checked.

A new column has been added to the Inbox List page that will display the search criteria type selected.

### ACCESS APPLICATION SUMMARY PAGE

As mentioned, different responses to the ACCESS questions will now create special attention flags which will display on the CWW ACCESS Application Summary page. For your reference, here is the full list of special attention flags that could display on the Application Summary Page.

- At least one person may qualify for Emergency MA
- At least one person may qualify for TB related MA services
- Authorized Representative
- Power of Attorney Legal Guardian
- Signature matches name
- Applicant signature does not match name
- Authorized Representative signature does not match name
- Power of Attorney signature does not match name
- Legal Guardian signature does not match name
- Application includes a Community Spouse with signature
- Application includes a Community Spouse but signature not provided

**NOTE** ➤ Special attention flags are viewable on the ACCESS Application Summary Page when processing an RFA. If you are not processing the RFA but want to see if the application contained any special attention flags, be sure to click on the magnifying glass in the ACCESS Applications section at the bottom of RFA Summary page.

## **ECF**

At the time the application becomes a case, a PDF of the application will be assigned the ECF code, <APP - Application> and stored in the Case Information subfolder in the ECF. (Refer to ECF Handbook Chapters 1.5 and 1.6 for more information). As always, an image of the form can be viewed by using the view button on the CWW ACCESS Application Summary page.

## **TRAINING**

Workers unfamiliar with ACCESS applications and the Inbox should review Systems Help and the following Process Help chapters:

- Chapter 66 – Inbox
- Chapter 2.3 – Processing an ACCESS application
- Chapter 3.12 – Conflict Resolution

In addition, a supplemental presentation, "[ACCESS Apply for Benefits and CWW Changes June 2007](#)," is attached to this memo. This presentation describes and demonstrates the changes outlined in this memo.

The CWW Refresher Lab will continue to be offered over the summer of 2007. These labs include an overall review of CWW and will be updated to include the changes outlined in this memo. The lab will also provide hands-on practice processing an on-line EBD MA application in CWW. Workers who would like additional support in processing these applications are encouraged to attend. Information about these classes will be announced via the DHFS Learning Center.

## **CONTACTS**

BEM CARES Information & Problem Resolution Center

★Program Categories – FS – FoodShare, MA – Medicaid, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – Food Stamp Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.  
DHFS/DHCF/BEM/JE